

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT				1. CONTRACT ID CODE		PAGE 1 OF 8 PAGES	
2. AMENDMENT/MODIFICATION NO. 0001		3. EFFECTIVE DATE See Block 16C		4. REQUISITION/PURCHASE REQ. NO. W-9-W1-20-OA-G14 000		5. PROJECT NO. (If applicable)	
6. ISSUED BY Internal Revenue Service 6009 Oxon Hill Road, Suite 500 Oxon Hill, MD 20745 BROWN, LEONA M 202-283-1296		CODE IRS0088		7. ADMINISTERED BY (If other than Item 6) See Item 6		CODE	
8. NAME AND ADDRESS OF CONTRACTOR (No. Street, county, State and ZIP: Code) TO ALL OFFERORS Vendor ID: 00055905				(x)		9A. AMENDMENT OF SOLICITATION NO. TIRNO-09-R-00021	
				X		9B. DATED (SEE ITEM 11) 06/01/2009	
						10A. MODIFICATION OF CONTRACT/ORDER NO.	
						10B. DATED (SEE ITEM 13)	
CODE		FACILITY CODE					

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☒ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended, ☒ is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:

(a) By completing Items 8 and 15, and returning ___1___ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATA SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and data specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)

**13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS,
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.**

(x)	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
	D. OTHER Specify type of modification and authority)

E. IMPORTANT: Contractor ☐ is not, ☐ is required to sign this document and return ___ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

See SF30 Continuation Sheet

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)	
15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. UNITED STATES OF AMERICA	16C. DATE SIGNED
_____ (Signature of person authorized to sign)		BY _____ (Signature of Contracting Officer)	

SF30 CONTINUATION SHEET

SOLICITATION QUESTIONS AND RESPONSES ARE HEREBY PROVIDED AS FOLLOWS:

SOLICITATION QUESTIONS AND ANSWERS

Question 1. Is the contract up for bid for the 2009 tax year/2010 filing season or is it for the 2010 tax year/2011 filing season.

Response: Tax year 2010, Filing Season 2011.

Question 2. What is the flexibility in Computer Configuration requirements? The new technologies allow the software to offer a lot of special capabilities. These new technologies require a lot of resources. Is there any flexibility on the system configurations?

Response: The mandatory requirements provided in the solicitation are minimum requirements and are required as stated. These requirements are based on IRS current configuration requirements.

Question 3. What is NSP on item 23?

Response: "NSP" means "Not Separately Priced".

Question 4. TIRNO-08-R-00026 - The 2008 bid was closed on November 12 and the proposal was cancelled on November 26th. Were there any offers received? What were the names of those companies? What were the details of the offers? Why was the proposal cancelled?

Response: Any information regarding offers received in response to a solicitation is procurement sensitive, including the number of offers and the identities of the offerors. Information contained within any such offer is proprietary. Procurement sensitive and proprietary information are not releasable.

The solicitation was cancelled to allow time to develop a solicitation that would more accurately reflect the IRS' needs for electronic tax return software and support services. Sufficient time was not available to revise the prior solicitation and make an award that would provide support for the 2010 filing season.

Question 5. 2005: TIRNO-04-R-00015: TIRNO-05-D-00005 - On 2/11/2005, project was awarded for \$16,921,647.00. Was the award amount per year or was it total amount for 5 years?

Response: This was the total award amount.

Question 6. Can we host all the web-based systems on our computers or some of them have to be on the IRS computer?

Response: All web-based applications are hosted on the vendors systems; and must adhere to the security requirements outlined in this solicitation and NIST 800-53.

Question 7. Where do we get information on 6.1 (1) - “IRS Tax Law Certification Test”? Is this system an independent one or is there any relationship with understanding of Tax Software?

Response: This is an adobe document. You can view it online by accessing IRS.gov key word search “Link and Learn Taxes”. It is not part of the Understanding Tax Application.

Question 8. <http://www.irs.gov/app/vita/index.jsp> is this link valid?

Response: This is a valid link for the IRS’ web-based tax law training portal.

Question 9. Where do we get information on 6.1 (2) “Trouble Shooting Scenarios”?

Response: IRS will provide topics and you build the tax scenario.

Question 10. Where do we get information on 6.1.1?

Response: 6.1.1 is a requirement for the contractor to work with the IRS in building a customized training curriculum that teaches use of the contractor’s software with IRS Tax Law. Basically, your response should show where you have customized training in the past for your users. IRS instructors will provide and teach the Tax Law.

Question 11. Who provides hardware resources for the online training? The IRS or the Tax Software Company?

Response: The Tax Software Company.

Question 12. 6.1 (6) – Are the IRS approved publications, to be added to the CDs, computer files (soft copy) or paper printed (hard copy)?

Response: We only request approximately 4 publications needed by our volunteer sites to be added to the CD. Users of the web-based application can access these on-line from IRS.gov.

Question 13. How many tax returns will be prepared under following categories?

- ☐ **Desktop English Tax Returns**
- ☐ **Desktop Spanish Tax Returns**
- ☐ **Desktop Efile Federal Volume**
- ☐ **Desktop Efile State Volume**

- ☐ **Web-based English Tax Returns**
- ☐ **Web-based Spanish Tax Returns**
- ☐ **Web-Based Efile Federal Volume**
- ☐ **Web-Based Efile State Volume**

Response: IRS does not capture statistics by “type” of application (desktop or web-based) used. The total volume of e-file returns is included in the solicitation. Of the total more than 185K were prepared for taxpayers who speak Spanish. Whether or not they requested their return printed in Spanish we do not capture. However, in providing good customer service the option is available to them. The free tax programs prepared more than 2 million state returns. The free tax program e-file rate is 93.5%.

Question 14. Will Federal and State government provide Spanish forms and publications like English forms and publications the IRS provides? Do we have to provide Spanish forms that are not provided by the federal or the state government?

Response: You do not have to provide Spanish forms that are not provided by the federal or the state government.

Question 15. Who is the current incumbent for this work?

Response: CCH, Incorporated (TaxWise software.)

Question 16. Can you provide a history of the amount of calls received for the Help Desk during peak and off-peak season?

Response: During December – March average call volume is estimated at 6,500 per week. During March and April, estimated call volume is 4,500 per week. During May-November estimated call volume is 2,500 per week.

Question 17. What level of tax law knowledge is required for Help Desk personnel?

Response: This contract is for help desk support of your tax product, not tax law. IRS provides tax law support to these program preparers. The level of tax law knowledge will need to be commensurate with the knowledge required to accurately operate your software and respond to inquiries on how to use your product including which forms,

schedules, or worksheets are required to create the end result of an accurate return. In the event the preparer challenges the outcome of the software, your help desk personnel should have enough tax law knowledge to defend and resolve the situation.

Question 18. Regarding Section 508, would it be acceptable to deliver audio information by Nov 13--similar to the multilingual printing requirement?

Response: Products are to be compliant with section 508 at the time of delivery. If the product being offered is not fully compliant at the time of the proposal but will be compliant at the time of delivery, the proposal must include detailed information explaining how the product will be compliant at delivery. The software delivery date is November 2010.

Question 19. Section 3.4.3 states: "The IRS may also request additional reports that require collation of data for a site or collection of sites." Would this be a separate task order requirement?

Response: No.

Question 20. Section 6.1.1 states: "The contractors program shall include and score IRS tax law certification tests." Do you mean the program (the software) shall include this--or our training program?

Response: The IRS provides the test and answer key. The contractor is responsible for including the test in their web-based training program, and scoring the test based on the answers provided by IRS.

Question 21. Solicitation Attachment 1 SOW Section 3.1.2 - The SOW states that all forms should be available in Spanish yet the IRS doesn't provide all forms in Spanish. Is this requirement limited to those forms already translated?

Response: Yes, you do not have to provide Spanish forms that are not translated in Spanish by the federal or the state government.

Question 22. Solicitation Addendum to SF 1449 - On the RFP, the periods start on February 10, and end on February 9 the subsequent year. To which Tax Season and tax processing year does the Base Year correlate? If this is for the tax season that commences January 1, 2010, what activity is expected prior to the start of the contract on Feb 10, 2010?

Response: The base year is tax year 2010, filing season 2011. At award the contractor will be expected to work with IRS to customize training curriculum to successfully train all users prior to the start of e-file for the 2011 filing season (tax year 2010).

Question 23. Solicitation Attachment 1 SOW Section 5.1 & 3.1.2 - Would it be possible for the IRS to provide support call volume data for both English and

Spanish for purposes of modeling support cost? e.g. total number of calls expected, historical percentage handled in English vs. Spanish.

Response: We do not have a requirement that help desk assistants speak Spanish. All our preparers speak English. During December – March average call volume is estimated at 6,500 per week. During March and April, estimated call volume is 4,500 per week. During May-November estimated call volume is 2,500 per week.

Question 24. Solicitation Attachment 1 SOW Section 5.2 - In section 5.2 it states that the customer support web site must provide some items which includes "software conversion updates". Does "conversion" refer to year over year conversion within the offeror's software or to an external import from a different vendor's software? e.g. is the offeror expected to convert all of the existing VITA client data from the currently used software into the new software?

Response: It is expected the contractor's software in the year of award will have the capability to convert the existing client data from the currently used software into the new software.

Question 25. Solicitation Attachments 2 & 5- Solicitation Attachment 5 (Past Performance Survey) states that "This survey must be administered to each of an offeror's three (3) customer references." Solicitation Attachment 2 (Addendum to FAR 52.212-1) states "The Government will contact the references to discuss and verify the information provided in this section using a Past Performance Survey questionnaire." The language in the Attachment 5 sounds like the offeror sends the survey. The language in Attachment 2 sounds like the government administers the survey upon follow up. Who is responsible for administering the survey?

Response: The IRS sends and administers the survey.

Question 26. Section 1052.224-9000 - Section 1052.224-9000 (a) Disclosure of Information --Safeguards (Jan 1998) appears to be a duplicate subset of 1052.224-9000 (c) Disclosure of Information --Safeguards (Jan 1998). Is this intentional?

Response: This is intentional. Both are separate Internal Revenue Service Acquisition Procedure (IRSAP) clauses which are required in solicitations/contracts that may involve the disclosure of tax returns or tax return information.

Question 27. Solicitation Attachment 2 Section II.1.2 - Per the Structure of Proposal Guidelines, Price Proposal information must be bound separately from the Technical proposal. However, because the Solicitation Document (standard form 1499) includes pricing information as well as the proposal signatures, should that document be bound with the technical proposal, the price proposal, or separate from both?

Response: The fully executed solicitation document shall be a separate document from the Technical and Price proposals and should not contain any technical or pricing information. It shall be signed and include responses to all representations and certifications in the solicitation. (e.g. FAR 52.212-3 and IR1052-04-001).

Question 28. FAR - During which portion of the Evaluation Methodology will the Solicitation Provisions and Clauses incorporated by Reference be evaluated and how will those be weighted/evaluated? In which portion of the Proposal response should responses to the Solicitation Provisions and Clauses incorporated by Reference be included?

Response: The solicitation provisions and clauses do not require responses, with the exception of the representations and certifications - See #27 above. These provisions and clauses set forth the legal agreement between the contractor and the IRS within which the solicitation and the resulting contract will be conducted. By submitting a proposal and signing the solicitation, an offeror has agreed to all the terms and conditions contained in each provision and clause, whether it was incorporated by reference or set forth in full text.

Question 29. Solicitation Attachment 1 SOW Section 7.11.1 & .5 - Can we assume that the FAR or DTAR regulations held applicable to this proposal are incorporated either by inclusion or reference and are specifically called out in the solicitation document TIRNO-09-R-00021?

Response: In accordance with FAR Part 1.101, Purpose, "The Federal Acquisition Regulations System is established for the codification and publication of uniform policies and procedures for acquisition by all executive agencies. The Federal Acquisition Regulations System consists of the Federal Acquisition Regulation (FAR), which is the primary document, and agency acquisition regulations that implement or supplement the FAR."

Although pertinent clauses and provisions have been included from the FAR and the DTAR, both documents contain extensive policies and procedures under which this solicitation and the resulting contract will be conducted.

Question 30. Solicitation Attachment 1 SOW Section 5.2 - What is the estimated number of IRS licensees that will be utilizing the Desktop application compared to the number using the Web-based application?

Response: Currently, approximately 20% of our users utilize the web-based application. The IRS anticipates that the number will rise under the new contract because of the more secure environment available in the web-based application.

Question 31. Solicitation Addendum to SF 1449 - Solicitation is for Indefinite Delivery, Indefinite Quantity, Fixed Price Contract. Do Cost Accounting System requirements apply?

Response: No.

Question 32. Solicitation Attachment 1 SOW Section 11 - What does the IRS consider a specific example of what constitutes a Tax Law Determination as a part of an interactive question and answer interview?

Response: A specific example would be the decision trees found in IRS Publication 17 for determining the taxpayer's filing status.

Question 33. Do we need to provide a GSA number on the solicitation document? Can we submit our response prior to receiving our GSA number?

Response: This acquisition is not a GSA schedule buy, therefore no schedule number is needed in the responses.